

GUIDEBOOK FOR DEVELOPING YOUR ACTIVITY'S MARKETING PLAN

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***“Action, to be effective,
must be directed to clearly
conceived ends.”***

-- Nehru

INTRODUCTION

WHAT IS A MARKETING PLAN?

A marketing plan is a written statement of how you intend to direct your activity's operations and promote its functions. A marketing plan can be compared to a terrain map. Both will answer three very important questions:

- What is your present situation? (Where does your activity fit in the competitive market?)
- Which direction did you come from? (Has your activity been doing the right things in the past?)
- Which direction should you go? (What things should your activity be doing to ensure success?)

Let's see what makes up a marketing plan.

Take a look at Figure 1.

MARKETING PLAN OUTLINE

- I. EXECUTIVE SUMMARY**
- II. EXTERNAL ENVIRONMENTAL ANALYSIS**
 - A. Competitive Factors**
 - B. Economic Factors**
 - C. Technological Factors**
 - D. Legal/Political Factors**
 - E. Social/Cultural Factors**
 - F. Ecological Factors**
- III. NEEDS ASSESSMENT**
- IV. ORGANIZATIONAL ASSESSMENT**
 - A. Organizational Environment**
 - 1. Command**
 - 2. Personnel**
 - 3. Resources**
 - 4. Consumers**
 - 5. U.S. Army**
 - B. SWOT**
 - C. Mission**
 - D. Goals and Objectives**
- V. STRATEGY DEVELOPMENT**
 - A. Product**
 - B. Price**
 - C. Place**
 - D. Promotion**

Figure 1

There are five main sections in a marketing plan. The first section, the Executive Summary is a brief summarization of the entire marketing plan. Its purpose is to give the reader a quick “heads up” without having to read the entire report.

The middle three sections -- the External Environment Analysis, the Needs Assessment, and the Organizational Assessment -- serve as your information storehouse or database. Planning must be based upon facts, and your planning and decision-making will rest upon this firm foundation of data. Now let's take a closer look at each of these three sections.

The External Environment Analysis will help you examine the setting in which your activity operates. You'll uncover specific information about how well or how poorly your competition is doing in the market place. You'll also collect valuable information on the economic, social, and technological aspects of your activity's operating environment.

You'll get a thorough understanding of your customers' needs and wants from the Needs Assessment section. A needs assessment is an organized method of gathering and analyzing data about your installation's Army community. You can obtain this information by surveying your clients, by working in focus groups with consumers, by holding brainstorming sessions with subject matter experts, or by reviewing previously written (historical) documents on a given subject.

Next, you'll study your activity's internal operating environment (Organizational Assessment). You'll examine how your activity's operation in the market place is affected by its command, its employees, its resources, and by the Army system in general (especially regulations).

Once you've evaluated conditions outside and inside your activity's operating environment and you have a thorough understanding of your community's needs and wants, you'll develop goals and objectives for your activity (Organizational Assessment).

Last, in the Strategy Development section, you'll describe the methods in which your activity will carry out its plans for satisfying community needs and wants.

WHY IS A MARKETING PLAN VALUABLE TO YOU?

Here are some of the ways that a marketing plan can help your activity:

1. **A marketing plan serves as a planning tool.** Whether you're developing long-range goals and objectives for your activity or you're planning a new program or product, a marketing plan will make your job easier. How? -- by guiding you through orderly steps of planning.

Think back to the last time you developed or revised a product or program for your activity. Like most managers, you probably tried very hard to plan for success. You did what you thought should be done. But do you remember having a nagging feeling that maybe you didn't "cover all the bases" as far as planning was concerned? Few people would feel comfortable building a house without a set of plans; likewise, few people would feel confident in planning for their activity without a guide. When you use a marketing plan, you'll have the assurance of having done a thorough job of planning.

2. **A marketing plan helps you determine where your activity fits in the competitive market.** Can you say for sure why people should choose your activity instead of one of your competitors? Do you know how your products and your pricing compare to other similar establishments? A marketing plan for your activity will give you a clear picture of your competitive arena. You'll clearly see what your activity should (and should not) be doing in order to best serve the Army community.

3. **A marketing plan helps you determine which direction your activity came from and which way it should be going.** Good planning for the future requires looking back at your activity's past performance, focusing especially on how well it has served its customers. Based upon your understanding of what led to its present operating condition, you'll then be ready to develop goals and objectives for your activity (Strategy Development section).

4. **A marketing plan serves as your information source for future planning.** Let's suppose that you're planning to run some new programs. Naturally you want to do a thorough job of planning. About six months ago, you completed a marketing plan for your activity. Does this mean that you have to develop a whole new marketing plan for the new programs? *No, you don't need to develop a new marketing plan each time you make changes and adjustments in your activity.* Why not use the research that you've already done for your marketing plan as the basis for developing these new programs (or products) for your activity? (Actually, it's best to revise or rewrite your activity's marketing plan annually to keep pace with changing conditions on-post and off-post. If conditions change radically during the course of a year, you'll need to develop a new marketing plan. For example, a new commander may come on post and may require entirely new programs/products from your activity).

Here's another benefit -- a marketing plan serves as a touchstone for evaluating your activity's operations. At any point in time, you can look at your activity's performance and compare it to what you projected in your marketing plan. You can tell whether your activity is on target in meeting its goals and objectives.

5. **A marketing plan helps you manage your activity's resources.** A marketing plan is more than a planning tool--it's a management tool as well. It will help you appraise your activity's resources, its employees, and its strengths and weaknesses. You'll design ways of managing your activity's assets as you move through the Strategy Development section.

With dwindling resources and continued budget cutbacks on the horizon, it's hard to think of a more persuasive tool for justifying your funding requests than a well-documented marketing plan. A marketing plan puts your activity in a very professional light. By documenting what is working well, what needs fixing, and which resources you need in order to maintain or improve a quality product, you'll be in a very convincing position to state your case to your superiors.

6. **Your marketing plan will help your activity remain competitive.** Most analysts agree that business competition will become fierce in the coming decade. Your competitors probably have a well-devised plan for increasing their market share. What will be your activity's response?

WHO DEVELOPS THE MARKETING PLAN?

You, as an activity manager, don't have to develop the marketing plan alone. In fact, it's better if you include your staff. Developing your activity's marketing plan in a cooperative effort boosts morale by fostering staff participation. Your staff members will feel a pride of ownership toward the planning strategies that they help develop. Tap into your staff members' wealth of knowledge and expertise.

WHAT IMPACT DOES YOUR MARKETING PLAN HAVE?

Remember why your activity exists: To provide for the needs of the soldier and his or her family. Whenever your activity makes soldiers' lives more agreeable, it means that your activity is fulfilling its mission. Use your marketing plan to help your activity operate more effectively. Keep copies of your marketing plan readily available at your activity so that you and your staff members can refer to it regularly.

Your activity's marketing plan may find its way up the ladder and contribute to other levels of planning at your installation. In some instances, the division chief will incorporate activity-level marketing plans into the division's marketing plan. Next, the ADCFA and/or the installation marketing specialist will develop an installation -wide marketing plan (or business plan) based on the input from the division chiefs and activity managers. You can have an active part in the decision-making process at your installation through your activity's marketing plan.

WHERE CAN YOU GO TO OBTAIN DATA FOR YOUR MARKETING PLAN?

Here are some sources that you may wish to consult while you develop your marketing plan:

ON-SITE:

- **Your installation marketing specialist.**
- **Your activity's customer files** -- for demographics and personal characteristics on present and potential customers, as well as levels of satisfaction.
- **GI/DPCA/Adjutant General's Office** -- potential active duty market by rank; number of persons married, quartered on-post, housed off-post; number of retirees; number of individuals with special needs; population breakdown per unit; and staffing situation.
- **NEO (Noncombatant Evacuation Operation) and EEO (Equal Employment Opportunity [civilians only])** -- ethnic and racial composition.
- **G3/SPMO Training Office/Special Projects Management Office** -- unit training schedules.
- **DODD Schools** -- information on the K-12 grade market.
- **Chaplain** -- calendar of religious holidays and activities.

OFF-SITE:

- **Better Business Bureau** -- directories of local businesses; listings of codes; standards of operation.
- **Chamber of Commerce** -- information on business sizes, numbers of employees, wage scales, local economic trends, potential competition (inquiries from outside firms).
- **State/Local Department of Tourism/Economic Development** -- number and types of tourists, tourist attractions and spending; new housing starts; economic trends.
- **State/Local Department of Education** -- listing of local colleges and schools; standings of local public schools; lists of private schools, day care centers; school-age population analysis.
- **State/Local Department of Human/Social Services** -- job markets; information on services available for referrals; ideas for your activity to bridge gaps in existing services.
- **Local Churches** -- information on available day care, social services, and religious events.
- **Local Chapters of Clubs, Charities** -- information on scholarships, services, activities.
- **Local Businesses** -- information on sponsorship for special events, employment opportunities, internships, training, and scholarships.

DIRECTIONS FOR DEVELOPING YOUR MARKETING PLAN

Don't feel put off by the thought of developing a marketing plan! We at the CFS MWR Academy have simplified your task by breaking the process down into a step-by-step operation. This booklet will guide you in gathering and analyzing your data. It will also coach you in applying that data and developing marketing strategies for your activity. We can even help you with the actual writing of your marketing plan by giving you some guidelines on that, too. If you have questions along the way, please contact our marketing specialist or one of our marketing instructors.

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Use the Appendices in Book II frequently as you develop your marketing plan. There's a Marketing Plan Outline in the Appendix A. The directions in this booklet for developing your marketing plan will follow the sequence of the items listed in the Marketing Plan Outline.

Appendix B contains a marketing plan for Fort Imaginary Transient Billeting. Refer to this sample plan for proper format, style, methods of presenting data, and general content.

HELPFUL HINT

Marketing plans are generally written in the format and style of the sample plan in Appendix B. You may modify your marketing plan so that it differs from the sample, but keep your changes limited to the External Environment Analysis section. If any factors in this section don't pertain to your activity, then don't address them in your marketing plan.

Otherwise, be certain to address all other components listed in the Marketing Plan Outline. (You'll see that Factor F, "Ecological Environment," was omitted from the sample marketing plan because it did not apply to the Billeting operation).

Appendix C, "Marketing Plan Food for Thought," lists topics for discussion that you may wish to include in your marketing plan. These topics are divided into four sample activity areas: Child Development Centers, Officer's Clubs, Arts and Crafts, and Family Member Employment Assistance Programs. Use the "Food for Thought" section to help jog your mind into considering key factors to analyze. Refer to the part of Appendix C that relates the closest to your activity, and use it as you work on your marketing plan.

You'll be gathering a considerable amount of information as you develop your marketing plan. To make things easy for yourself, keep your notes in an orderly arrangement. We suggest using the worksheets in Appendix D. These worksheets will prompt you as to the kinds of information you'll need to gather. They'll also help keep your notes organized, concise, and detailed.

Don't feel locked into using these worksheets. If you have your own system of taking notes, by all means do whatever works best for you! We would suggest using a notebook with removable pages that you can rearrange when necessary. As you progress from one section of the marketing plan to the next, you can refer to the notes that you recorded earlier.

Regardless of which method you use, *be sure that your notes are clear and detailed enough for your later use!*

One important note before we begin!!!

We'll be using the word "product" throughout this booklet to represent whatever your activity provides for its community. Products can be goods, services, or ideas. Let's look at the differences among the three.

Goods have physical properties, such as a certain appearance, form, weight, color, etc. Goods can also be stored, both by the producer and the customer. For example, golf balls are considered goods because they have definite physical properties, and because the seller and the customer can keep them in storage. "Fast foods," on the other hand, are not considered goods. Although "fast foods" have definite physical characteristics, they don't meet the storage criterion. "Fast foods" aren't stored by the customer; they're consumed on the spot. Therefore, they are considered a service.

Services are intangible; they don't have physical properties. Instead, services involve an interpersonal exchange. Activity members perform them for the customer. For example, sports activities (the events not the players, nor the equipment, etc.) are community services because they have no physical properties, and also because they are done (put on, or held) for someone (the customers).

Ideas are also intangible, but they are not performed. They are strictly cognitive, that is, they belong to the mental or intellectual realm. Information that is given during a financial counseling session is an example of an idea. Slogans and messages on bumper stickers are other forms of ideas.

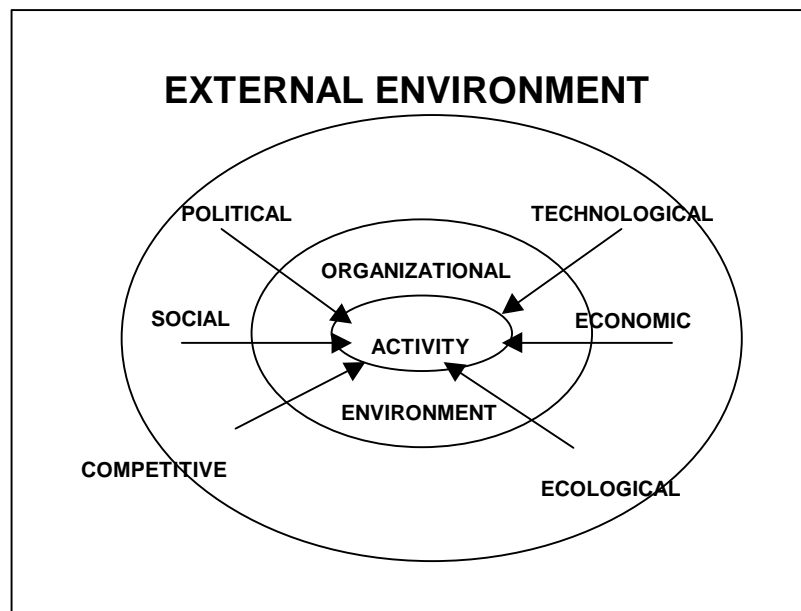
I. EXECUTIVE SUMMARY

The Executive Summary is a brief presentation of the high points of your marketing plan. Write this section after you finish all the others. Consult Step 20 of this guide.

II. EXTERNAL ENVIRONMENT ANALYSIS

Part of the fun of traveling by airplane is looking at the country from a bird's-eye view. It's fascinating to see how everything fits together -- the roads, the buildings, the scenery. We get a different perspective of our environment; we can see how things fit in an overall scheme.

In business, it's also important to get a fresh perspective of things from time to time. The External Environment Analysis section of your marketing plan will help you do just that. The External Environment Analysis is a look around at the setting in which your business operates. It paints a picture of the business world "out there" -- outside the boundaries of your activity. As you complete this section, you'll get a general picture of the major elements that influence your business environment (see Figure 2).



It's best to begin your marketing plan with an External Environment Analysis because it puts things into perspective, that is, it clearly marks the boundaries that your activity works within. Here are some of the major questions that the External Environment Analysis will answer for you:

- What is the competition doing, and how will competition affect your business?
- What is the condition of the economy? How is it affecting your activity?
- How is technology affecting your activity? What is the state-of-the art technology in your business field? How does your activity's equipment compare to your competitors'?
- What legal and political factors are now or will be important to consider in your activity's game plan?
- What influence will social and cultural factors have on how you market your product?
- What ecological factors should you consider in planning?

STEP 1: EVALUATE YOUR COMPETITIVE ENVIRONMENT

Let's begin by sizing up your activity's competition. Your competition is a very important aspect of your activity's external environment.

Use the worksheet "Competitive Environment" (Appendix D, page D-2,) to help you analyze your activity's competition.

HELPFUL HINT

Your direct competition includes those places where your customers/potential customers can go to obtain the same product that your activity offers. Indirect competition includes those places where your customers/potential customers can spend their time or money, although they are not dealing with products that are related to those your activity offers. For example, suppose you are the manager of the post NCO Club, and you are planning a dance for Friday evening. Some of your customers may choose other events, such as going to

the theater, going bowling, or just staying at home and watching television. These other events would be indirectly competing with your activity.

Take note of how influential and how extensive the competition is. Answer the question, "What sort of competition are we up against?" Think in terms of threats and opportunities to your activity. For example, any new potential competitor in the market place would obviously be a threat to your activity if it has the potential of taking away part of your share of the market. A competitive threat can come from not only a commercial enterprise, but also from other on-post activities -- even if they are unrelated to your field of business -- merely due to the fact that you both may be scheduling events for the same times. Also be alert for opportunities to expand your operation, such as a competitor who is closing, relocating, or changing its management.

Collect any additional information about the competition that you think is important. You may wish to visit your competitors. Network with other activity managers. Add that information to your worksheets.

Be sure you have determined the following:

- **The impact of the competitor on your activity;**
- **All unique features of the competition's products;**
- **The relative market share for your activity and your competitors;**
- **The competition's marketing tactics.**

HELPFUL HINT

Remember to keep the tone of your writing neutral, much as a reporter would write a newspaper article. Deal in facts; treat the data objectively.

STEP 2. EVALUATE YOUR ACTIVITY'S LOCAL ECONOMIC ENVIRONMENT

As an activity manager, you should be regularly monitoring the state of the local economy. From your general knowledge, jot down some notes onto the "Economic Environment" worksheet, (page D-3). Here are some questions to jog your thinking:

- Is the local economy on the rise or decline?
- In what ways will economic trends affect how your customers and potential customers use your activity?
- If consumer spending is declining, does this mean that your customers will be spending less time or money at your activity?

Think in terms of threats and opportunities.

HELPFUL HINT

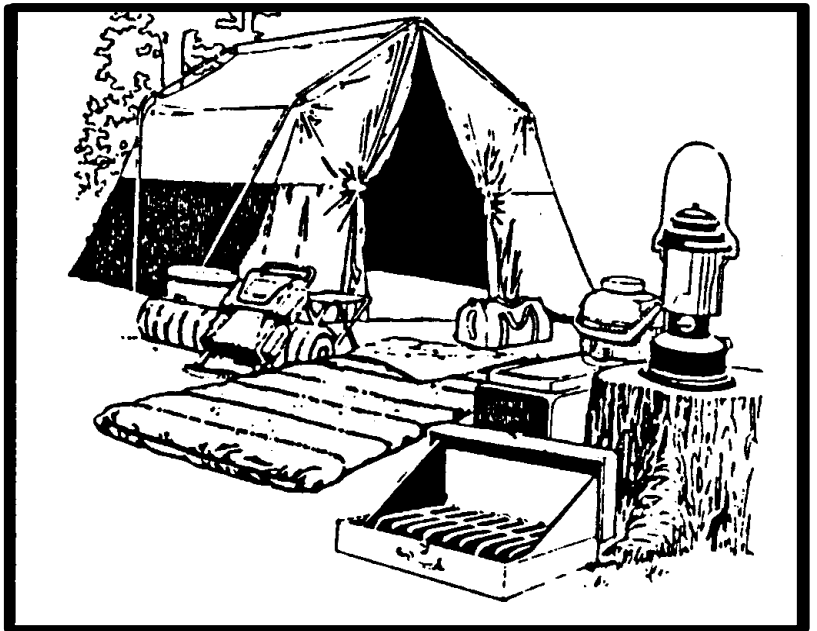
The impact of economic trends sometimes depends upon the type of activity that you operate. Negative economic trends don't always result in a downturn in customer turnout. For example, as people decide to spend less on entertainment and stay at home more, your Youth Services programs may get more participation. Or, perhaps with less spending money available, people in your community won't be as willing to travel the distance to go to your offpost competitors. Then you might emphasize features such as lower cost, less travel, and greater family participation in order to attract more clients. These are examples of seizing opportunities for your activity to serve the changing needs of soldiers and their families.

STEP 3: EVALUATE YOUR ACTIVITY'S TECHNOLOGICAL ENVIRONMENT

Does your activity have any competitive advantages from its use of certain equipment or processes? Or is your activity at a disadvantage because it is lacking in this area? Find out what forms of technology are available that would help your activity serve the Army community better. Try turning as many threats into opportunities that you can.

Consider technology from two aspects:

1. Product technology. Is your activity providing goods at the level of development or advancement that your customers require? Suppose, for example, that you are managing an Outdoor Recreation Center. You would need to determine whether the camping equipment that your activity provides is at the level of technological development that your customers require. Is it possible that your customers, being accustomed to military gear, may not be comfortable with equipment that is popular on the civilian market? On the other hand, if your customers are looking for a certain level of product sophistication, then you may have to do some upgrading of your product. Think of ways to match the level of your product technology to your customers' requirements.



2. Process technology. Process technology pertains to the ways and means of getting jobs done, such as doing paperwork, keeping records, providing service, and making sales. Does your activity operate using the latest available methods for improving efficiency?

Again, supposing you're the Outdoor Recreation Center manager. Could operational efficiency be improved by using your new computer system to reduce paperwork? Could you get somebody trained to perform some advanced accounting functions on it, for example?

To help you determine what impact technology is having on your activity's operation, turn to the "Technological Environment" worksheet (page D-4).

STEP 4: EVALUATE YOUR ACTIVITY'S LEGAL/POLITICAL ENVIRONMENT

Like most other aspects of modern living, our political and legal scene is very complicated and is ever-changing. Therefore, it's important to keep on top of the legal and political issues that may affect your activity.

Review recent national and local political issues, policies, and regulations. Sort out those that affect your activity. Jot down your thoughts about how recent laws and rulings are affecting your activity. Use the worksheet "Legal/Political Environment" on page D-5.

HELPFUL HINT

hours' worth of work should do it.

This may sound like a tall order, but one way of doing this sort of research is to go to your installation library and look over the Sunday issues of a newspaper that provides comprehensive coverage, such as the **N.Y. Times**, **Washington Post**, or other similar newspaper. Look through the table of contents to help jog your memory of past events. Or, use the popular weekly news magazines like **Newsweek** or **Time**. Go back through the past nine to twelve months. Pick out a few political issues from each. Skim through any of the articles that deal with issues affecting your activity. One or two

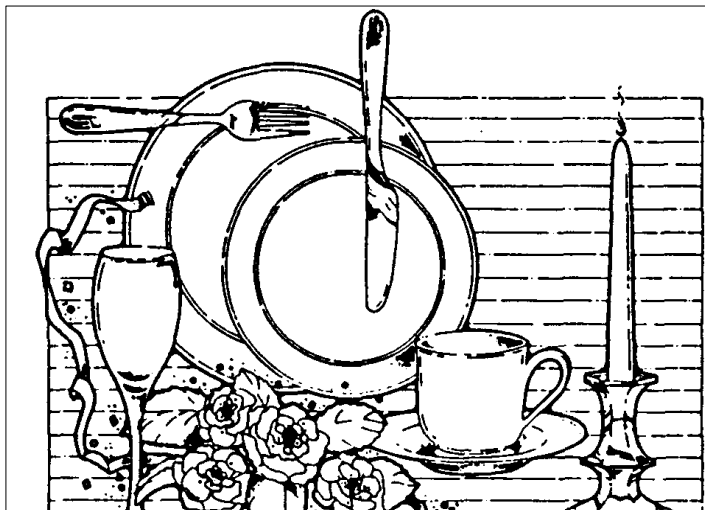
Now go one step further -- try to anticipate possible changes in the laws and regulations that may affect your activity. Changes in European politics, for example, will certainly affect American troop commitments there. Will your installation experience a reduction or an increase in troops as a result? This could pose as either a threat or an opportunity to your activity. In what ways, then, would your activity need to adjust to those changes (and possibly seize upon some opportunities)?

STEP 5: EVALUATE YOUR ACTIVITY'S SOCIAL/CULTURAL ENVIRONMENT

All societies change over time. Values are being constantly re-examined. Behavioral patterns and expectations change continuously. Our society today is the result of a long series of changes and modifications.

What social issues do people feel are most important? Is your activity capable of meeting these demands? Think in terms of threats and opportunities for your activity. Let's look at some examples.

- Healthier lifestyles -- nearly everyone young and old has become alert to the new ways of thinking about what we eat, how we need to exercise, and the general improvement in how we treat our bodies and minds. Pressure is growing from customers for better foods and safer environments. This demand for healthier lifestyles might affect your activity in negative ways (as threats). If, for example, you're managing a dining room, you may have to make some changes on the menu or in the way certain foods are prepared. However, this new demand can also affect your activity in positive ways (as opportunities). This could be your chance to attract new customers by offering those new types of health foods!



Here are some other recent changes in our society for you to consider:

- **Recent changes in family structure, such as dual income families, single parents, realigned families, and particularly the dwindling amount of time available for parents to spend with their children;**

- Women in the work force, resulting in higher disposable incomes, changes in the work environment, and changes in product demands;

- Our society's aging population, with increasing demand for social services, decreased emphasis on youth, and more attention to the older segment of the population;

- Increased demand for training and education, such as more adults returning to classes for better job skills, and more sophisticated use of leisure time;

- Increased awareness of drug and alcohol abuse, such as the deglamorization of drinking, emphasis upon socially responsible behavior, and demand for alternate activities.

Consider the latest trends in the social environment (both on the national and local levels) that impact your activity. Jot down your ideas on the worksheet on page D-6.

STEP 6- EVALUATE YOUR ACTIVITY'S ECOLOGICAL ENVIRONMENT

Is your installation situated in an area that is sensitive to environmental issues? Restrictions and limitations on Army activities are increasing rapidly. For example, what plans do you, the Arts and Crafts Center manager, have for disposing toxic materials, such used chemicals and left-over paints? Does your activity participate in any recycling programs? Should you begin one for your activity?

Again, look at the threats involved in ecological issues, such as higher operating costs, increased paperwork, and perhaps operating under more restricting conditions. Likewise, search out any potential opportunities associated with environmental issues. If your area has very cold winters, for example, could your activity provide some service for your community members to help get them through the difficulties and boredom of that -season?

Record your notes on ecological issues on the worksheet on page D-7.

III. NEEDS ASSESSMENT

STEP 7. DETERMINE YOUR CUSTOMERS' NEEDS

THE NEEDS ASSESSMENT IS THE MOST IMPORTANT PART OF YOUR MARKETING PLAN.

What's the purpose of doing a needs assessment? A needs assessment will answer two key questions concerning your customers:

1. "What do the Army community members on this installation need or want (as far as my activity is concerned)?"
2. "How can my activity help fill these needs?"

Does this all sound too difficult to do? Don't stop now! If you're willing to invest a little more energy, your efforts will pay off the rich dividend of knowing that your planning efforts will result in products that the community really needs and wants! Now, how you do a needs assessment?

First, you determine what are the present situations or conditions that need investigation. Perhaps something is not happening... something is wrong... the community is lacking in some area. Maybe you wish to see if your customers' needs have changed over a period of time. Perhaps you feel that one of your activity's products or programs needs alteration but you want to find support for making the changes. Or, maybe you want to see if your activity is doing things right, as a sort of confirmation that your activity is meeting the community's needs. In other words, there is an information gap that needs to be filled. Consult the worksheet "Needs Assessment -- Information Gap and Research Objectives" on page D-8. This worksheet will help you decide on the main purpose for doing a needs assessment.

Next, choose a method for collecting your information. Will you go directly to your customers by using a survey? Will you use brainstorming sessions or focus groups? Maybe you'll decide that doing historical research is sufficient. Follow the worksheet "Needs Assessment -- Research Design" on page D-9 to help you plan your research.

After you pick a method for collecting your data, you'll need to plan how to use it. If you choose to use a survey, try it out on a small test group first. A first draft usually needs some revisions. You may wish to practice a focus group or brainstorming session with some of your staff members before holding the actual sessions. Try to anticipate some of the responses that you'll get, and practice how to deal with those responses.

Then collect the data and analyze it carefully. The object in analyzing data is to look for trends or patterns. We suggest categorizing the data into two main parts: the needs or "concerns" of the respondents, and population characteristics. The worksheet on page D-10, "Needs Assessment Summary of Results" will greatly simplify your work.

Quantify your information to help highlight major trends. If you're familiar with using basic statistics, by all means apply them. If not, go to someone on post who can help you.

* * *

Now comes the time to present your data findings in your marketing plan. Divide the needs assessment section into two parts. In the first part, briefly describe the method you used to collect the information. Present highlights of the data that you consider most important. Concentrate on the factors that your activity can have some control over, given its abilities and constraints. Tabulate the data for easier reading wherever possible.

In the second part, give a brief interpretation of the data. Again, stress the issues/concerns that your activity is capable of doing something about. Use a positive approach. This doesn't mean that you should give false impressions. If something is wrong, say so. Nevertheless, show the reader how your activity can address these issues. Use the worksheet on page D-11, "Needs Assessment - Discussion of Results," to help you organize your thoughts.

IV. ORGANIZATIONAL ASSESSMENT

A. ORGANIZATIONAL ENVIRONMENT

Let's pause at this point and review what you've accomplished so far. You began by examining the environment outside your activity (External Environment Analysis). This gave your reader a picture of the setting that your activity operates within. Then you took a careful look at your customers' wants and needs (Needs Assessment).

Now, with the Organizational Assessment, you're ready to work systematically toward developing goals and objectives for your activity.

You'll begin with an evaluation of your activity's organizational (internal) environment. You'll analyze five important aspects of your activity's operational setting: its command, its employees, its resources, its consumers (target markets), and the Army's system of operation (see Figure 3).

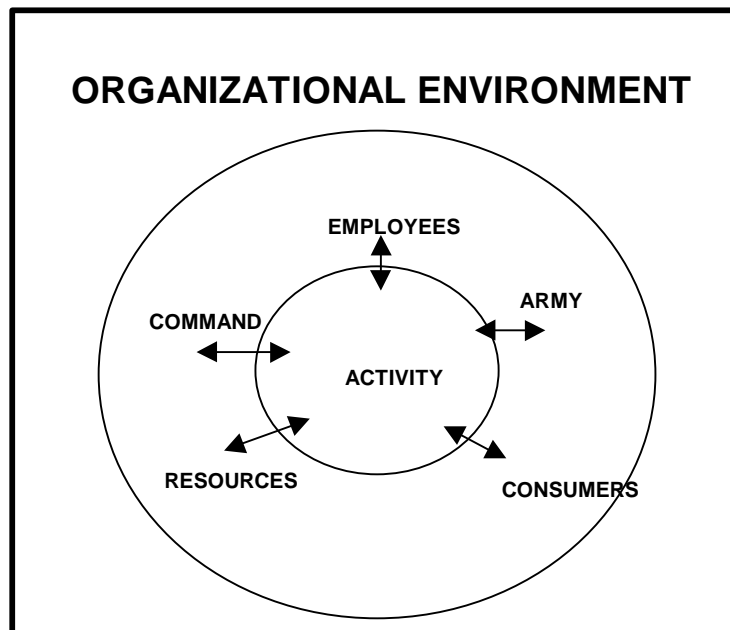


Figure 3

Next, you'll take an inventory of your activity's strengths and weaknesses. You'll review opportunities for your activity to grow and advance in serving the Army community. Of course, proper planning also includes addressing the negative factors or "threats" which will adversely affect your activity. Then, after you've assessed your activity's capabilities and limitations, you'll write your goals and objectives.

Let's take this one step at a time. Begin your Organizational Assessment with a description of your chain of command.

STEP 8. EVALUATE THE IMPACT OF YOUR INSTALLATION'S COMMAND STRUCTURE

In this part of your marketing plan, you'll give your reader a brief picture of the operating guidelines set by the leadership at your installation. Describe their approach to CFS activities, particularly toward your activity. Are they tuned in to important subjects, such as providing first-rate child development services? If not, what are some things you can do to help get more support? (Remember to use an objective tone in your writing.)

What impact does command have on your operation? How does command's philosophy relate to yours? Be sure to take into consideration your installation's mission and its impact on your command's philosophy. Record your findings on the worksheet "Command," page D-12.

STEP 9: EVALUATE YOUR STAFF'S PERFORMANCE

Take an objective look at your staff. Consider the quality of their work -- their attitudes, motivation, and general morale. How do these factors affect your customers? Is personnel performance satisfactory? If so, what will be needed to maintain that level of performance? If their performance is deficient, what are the root causes--poor motivation, insufficient or inadequate training, negative environmental factors, or a combination of these? Remember: ***The bottom line in your analysis of personnel performance is customer satisfaction!***



Use the worksheet "Personnel" on page D-13.

STEP 10: EVALUATE YOUR ACTIVITY'S RESOURCES

What resources does your activity have (or require) in order to meet your customers' wants and needs? Divide these resources into three categories: personnel, facility, and funds.

1. Personnel. Your staff members are probably your most vital resources. They represent your activity and help distinguish it from the competition. How is your activity's staff affecting the quality of customer service? Look at the size of your staff. With today's lean budgeting, you need to be sure you're utilizing your employees in the most effective ways. Are staff always available at the most critical times? Maybe work schedules need adjusting. Are you thinking about recruiting volunteers? Have you considered commercial sponsorship for special events?

2. Facility. Consider the condition, age, and location of your facility. What impact does it have on your customers? What kind of message does its appearance send out? Are people attracted or turned away by its appearance? Are there any hazards, such as peeling paint or stairways that need repair? Is your activity located in a place that's easy to get to or where traffic spills over from other activities?

Which factors can you do something about? Are there alternate ways of getting improvements done? If funding is tight at your installation, can you think of other ways to raise money for those needed items, like having a car wash, a "barn raising," a bake sale, a garage sale, or recruiting volunteers? Is commercial sponsorship available for the grand opening of your new program? (Find out whether you'll need clearance for some of these activities.)

3. Funds. Be sure to refer to your activity's budget and financial statement when addressing funds. Point out limitations and opportunities that your current funding situation present for your activity. Record your findings on the "Resources" worksheet, page D-14.

STEP 11: EVALUATE YOUR ACTIVITY'S CONSUMERS



Your objective for this step is to clearly define your activity's target markets. Who are your customers now? Who should your customers be? Think in terms of primary and secondary target markets. Who are you currently reaching with your marketing efforts (primary target market)? Are there other significant target markets that you're missing (secondary target markets)?

Are there secondary target markets that you can satisfy with your current products? Can you offer new or different products to better satisfy your present customers or attract new customers?

Base your decisions mainly upon your needs assessment. Include other factors from your External Environment Analysis, where applicable. Evaluate your current products and proposed products in terms of the target markets that you have defined. Compile your information on the worksheet "Consumers," on pages D-15--20.

**HELPFUL
HINT**

Be sure to take the perspective of your target markets, and not your own!

STEP 12. EVALUATE THE IMPACT OF THE ARMY'S OPERATIONAL STRUCTURE ON YOUR ACTIVITY

By the Army's "operational structure" we mean the general framework that the Army operates within. Look at the Army's rules and regulations. Are there products that you must offer or cannot offer according to the regulations? Are your prices set by Congress, the Department of the Army, or by your installation commander? Review Army regulations that pertain to your activity. Look for restrictions that limit the operation of your activity, and for opportunities for required services. Your commander's requirements and policies are perhaps most important to review in this section.

Also consider the system of rank. The influence of rank in military circles is ever-present and is very important. How does it affect the way in which your activity operates? Are you required to provide separate facilities for different ranking customers? Are your prices set according to rank? Do you need to make any changes in your operations based upon rank structure?

Don't forget to review how Army funding affects your activity. With two funding sources (APF and NAF), how will your activity adjust to any changes in those areas? Consider which category your activity is in and how that affects your ability to generate funds. Use the worksheet on page D-16.

B. STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)

STEP 13: DO A SWOT ANALYSIS FOR YOUR ACTIVITY

We've all read books and articles on self-improvement -- topics such as how to be more successful, more persuasive, etc. Regardless of the topic, the approach is generally the same. Before we can develop strategies for self-improvement, we must first take a personal inventory of ourselves and find our strengths and weaknesses.

It's not much different when it comes to developing marketing strategies for your activity. Begin with a long, hard look at your activity, some of which may not be too pleasant. Take an inventory of your activity's strengths and weaknesses. Record your findings on the SWOT worksheets on pages D-17-20.

As an example, let's say your needs assessment showed that your dining facility is very popular. Your patrons enjoy the fine quality of food and service. That's a strength of your activity. Strengths are attributes that your activity possesses which help it serve the Army community. Strengths are controllable; you have control over the quality of your activity's operation. Strengths give your activity a competitive edge.

Let's say that your needs assessment indicated that your selection of goods is too narrow. That's a weakness, because narrow selection is hurting your operation. You can do something to change that situation, such as increasing the variety of your selection.

Now let's talk about opportunities for your activity. Think of some changes in the external environment that your activity could use to serve its customers better. Perhaps there are new products coming on the market that would be beneficial to your customers. Note that opportunities are events that occur in the outside world that you cannot control. However, you can seize opportunities and utilize them to enhance your activity's service.

Finally, let's discuss the major threats that confront your activity. Threats are negative events that are now -- or will shortly -- affect your activity. As with opportunities, threats are uncontrollable. However, you can take steps to lessen their impact. Think of a threat as a hurricane that's coming your way. You can't change its course, but there are some actions you can take, to reduce the damage, such as taping your windows and storing extra food and water. Suppose, for example, that the commander is clamping down on drunk drivers on post. Your activity serves alcoholic beverages. To offset this threat to your activity, why not begin promoting non-alcoholic substitutes? You'd be doing something to reduce the threat's impact (as well as defusing the commander's concerns as they apply to your activity).

This SWOT section of your marketing plan is designed to provide a quick look at your activity's capabilities. The key to writing this section is conciseness. Write the SWOT section of your marketing plan using "bullets" to highlight the main points.

As with the rest of your marketing plan, maintain a positive, professional approach to improving or maintaining your activity's operation.

HELPFUL HINT

At the beginning of this booklet, we stressed the importance of your staff members having an active role in the development of your activity's marketing plan. This is especially important in regard to analyzing your activity's SWOT. Make extra copies of the SWOT worksheets. Explain the concepts we have discussed in this section and heartily encourage their participation. Staff members are often very capable of appraising the activity that they work in. They get to see and hear things that managers simply cannot due to work relationships and business structure. Don't overlook this critical source of information!

C. MISSION

Up to this point, most of your effort has been devoted to analyzing the factors that make your activity what it presently is. Now you're on your way toward developing your activity's marketing strategies.

STEP 14: CITE YOUR ACTIVITY'S MISSION

Your objective for this section is to show how your activity's marketing strategies will support your installation's mission. Start with a brief statement of your installation's mission(s).

Next move to your division's mission(s). Show how your division's missions support those of the installation.

Conclude with a statement of your activity's mission(s). Show how your activity's mission supports the missions of the installation and the division.

HELPFUL HINT

Remember that your activity exists to serve the military community's needs and to support the commander in his/her efforts to enhance the readiness, retention, and morale of the soldier. Discuss your activity's mission from two perspectives: What your activity is doing, and for whom.

Use the worksheet on page D-21 to help you with your mission statement. Then refer to the sample marketing plan in Appendix B to get an idea of how to write your mission statements.

D. GOALS AND OBJECTIVES

STEP 15: STATE YOUR ACTIVITY'S GOALS AND OBJECTIVES

This section is the central point of your marketing plan. So far, you've collected a lot of important background information. Now it's time to describe your plans for your activity and how you intend to accomplish them.

Goals are long-term visions for your activity. They are general descriptions of what your activity will look like or what it will be doing in the near future.

HELPFUL HINT

If you haven't already been required to develop short-range (one year) goals and objectives, you probably soon will be. It looks like long-range (five-year) goals and objectives will also be a requirement in the near future. The information in this section applies to both types.

At any rate, here are some examples of goals for various activities:

- Make staff members at Fort Imaginary Recreation Center more sensitive to the needs of the single soldier;
- Make the golfing supply products at Fort Imaginary Golf Club more competitive with local sport shops.
- Help youth at Fort Imaginary become familiar with computers.

Let's look at the characteristics of goals. We'll use the last goal (about youths and computers) as an example.

1. *Goals are broad, generalized statements.* Goals are ideas that have not been fully developed yet. They are rough sketches of what you want your activity to do at a future time (for example, to help youths learn about computers).

2. *Goals are realistic and attainable.* No outlandish promises; no sweeping solutions. The reader must feel that your goals are credible.

3. *Goals are written in "bullet" form.*

How do you begin to develop your activity's goals? Review the issues that you cited in the External Environment Analysis, the Needs Assessment and the Organizational Assessment. List the critical issues that you uncovered from these sections on the Goals worksheet, page D-22. Decide on the number of critical issues that your activity can address within the time frame of your marketing plan. Keep this number small, between two to five or so. Then begin writing your goals using the three criteria listed above. List your goals in order of priority.

* * *

Once you've written your goals, the next step is to describe how your activity will reach them. Here's where objectives come into the picture. Objectives flesh out goals. Look at the sample objective that supports our goal statement:

GOAL:

- Help youth at Fort Imaginary become familiar with computers.

OBJECTIVE:

- Develop and implement an introductory program in computer literacy for children at Fort Imaginary between the ages of 12-15. To be fully implemented by the third quarter of FY 19XX

Here's what you need to know about objectives:

1. *Objectives describe specific actions.* They tell the reader what action you will take to fulfill a goal. (In our example, the action includes the development and implementation of a computer literacy program.)

Objectives also tell whom the action is intended for (namely, the youths at Fort Imaginary, ages 12-15).

Keep your objectives short. Use action verbs wherever possible. Use nouns that bring clear images and ideas to the reader's mind.

2. *Objectives are measurable.* They indicate how much change or improvement to expect. Some examples of measurable criteria are: increases in customer attendance, increases in revenue, and reductions in costs.

HELPFUL HINT

Avoid using specific quantities in your objectives, such as dollar amounts, numbers of persons, and similar measurements. Use percentages as criteria instead. This will allow you more flexibility in adapting to unforeseen events. For example, suppose you project a \$10,000 increase in sales for a given quarter. Then, unexpectedly, a large troop unit deploys from your post. Making that dollar amount you projected is now impossible. However, by using a percentage, your objective would remain viable despite any uncontrollable changes in

conditions.

3. *Objectives are designed to be accomplished within a given time period.* They tell the reader when the action will take effect (as in our youth services example: by the third quarter of FY 19XX). Develop your objectives with a completion timeline in mind.

4. Objectives should be in "bullet" form. Several objectives may be necessary to support one goal, but again, the key is brevity.

HELPFUL HINT

Here are some factors that you may wish to consider when developing your objectives: customer service, target markets, facility utilization, pricing, and physical plant conditions. Of course, others may also apply to your activity.

Use the "Objectives" worksheet on page D-23.

V STRATEGY DEVELOPMENT

Goals are the broad plans for carrying out your activity's mission. Your objectives elaborate on what methods your activity will take to reach its goals. The Organizational Assessment section of your marketing plan has taken you as far as developing goals and objectives for your activity. You still need to plan the "nitty-gritty" details of putting your objectives into action. We'll call these planning details "strategies."

Developing strategies means choosing the specific courses of action that you plan for your, activity. Address topics such as how your activity will gain a larger share of the market, how it will enter new areas of the market or how it will maintain its present level of success.

Organize your strategy development into four sections following "The Four Ps": Product, Price, Place, and Promotion (see Figure 4). This will give you a complete marketing mix for your activity.

MARKETING MIX

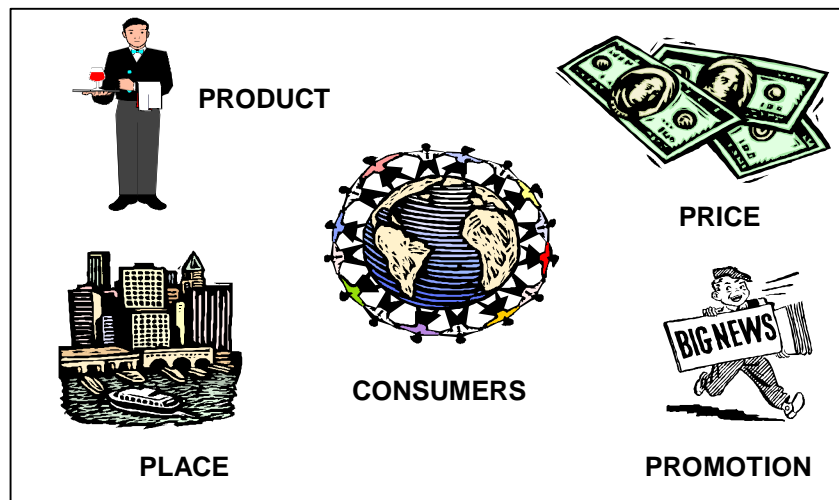


Figure 4

Now let's work on developing your activity's strategies. We'll start with the first "P" -- Product.

STEP 16: DEVELOP PRODUCT STRATEGIES

Different products consist of different mixtures of qualities or "attributes" (see Figure 5). You'll develop some of your marketing strategies by addressing your product's attributes.

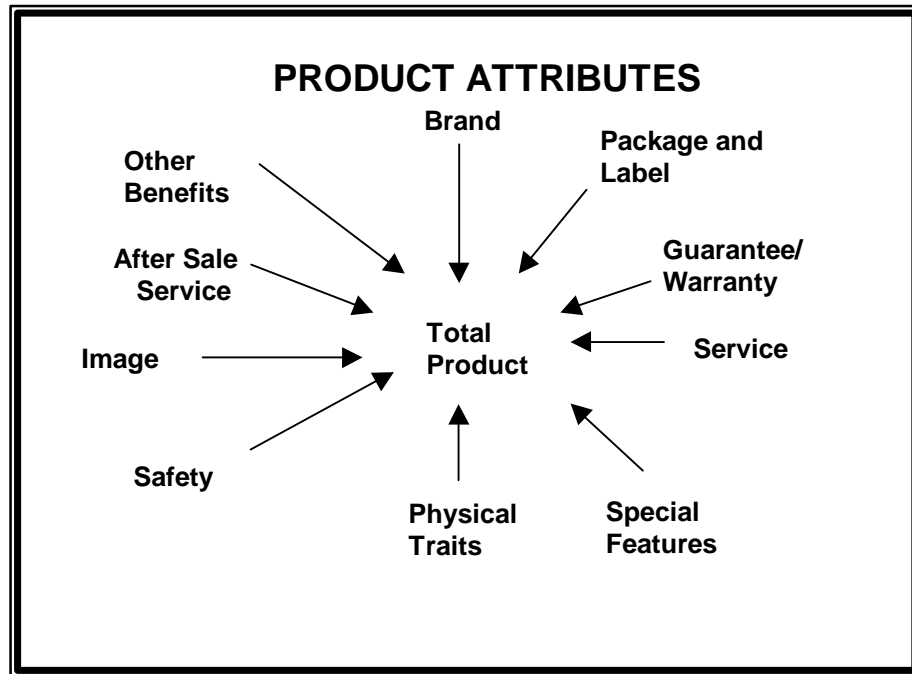


Figure 5

- **Brand Name.** The name of your activity is its brand name. Brand name is the first thing that pops into your customers' minds when they think about your product. For example, if someone plans to work on his/her car, subconsciously the name " Auto Repair Center" flashes through their mind. They probably aren't even aware that this happens. It happens instantly. And in that instant, either a positive, negative, or neutral image will form in your customer's mind.

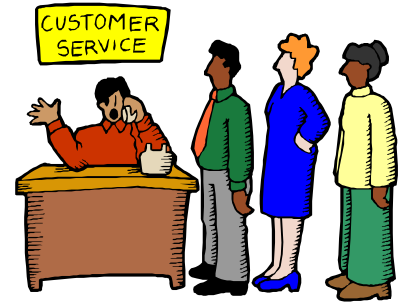
- **Package and Label.** Package applies to goods; label applies to goods, services and ideas. Product packaging and labeling also trigger mental images in your customers' minds. For example, where would you rather have lunch -- in a "mess hall" or in a "dining facility?" Packaging and labels play an important part in how customers regard our products. Some examples of package and label include your activity's logo (label), information brochures (package), shopping bags with your activity's name (package), and programs that you hand out at the front door for your activity's seminar on retirement planning (label).

- **Guarantees and Warranties.** These two items, which are part of both goods and services, usually come in an explicit, written form. One of the most common forms is the service warranty on an appliance. A less obvious form of written guarantee are the promises or pledges that some stores post on their walls that assure customer satisfaction.

Ask yourself: "How can our customers be sure that our product's quality will always be high?" How consistent is the quality of our products? Consumers will usually have some level of expectations for quality. How does your activity meet (or even exceed) those expectations?

- **Service.** Service is the way in which your product is delivered to the customer. *Service is a critical product attribute.* Whether a customer continues using your product depends largely upon how you offer it. Customers look for personalized treatment, such as helpfulness and friendliness. The importance of quality customer service has been proven in many marketing studies.

- **After-transaction Service.** The key to continued acceptance of your product is the satisfaction of your customer's needs long after the product has been delivered. After-transaction service reinforces the initial benefits that your customers receive when they patronize your activity.



- **Special Features.** You must continually meet the customer's challenge: "Why should I use your activity when I can just as easily go somewhere else?" This question is especially important regarding your potential customers. What does your activity offer that's special? What distinguishes your product from the competitions'?

- **Physical Traits.** This attribute applies only to goods. Where applicable, identify your product's physical traits that satisfy your customers' needs and wants. What attributes are most important to your customers?

- **Safety.** Assure your customers that your product will be physically and, where applicable, psychologically safe (for example, non-threatening, not embarrassing, not stressful). Customers must be comfortable using your products. Be certain to word carefully your statements on product safety and keep them in a positive light.

- **Image.** Be continuously aware of your customers' concept of your activity and its product. Regardless of what you perceive to be the truth about your activity, if your customers begin to form negative impressions, you will eventually lose their business! Look at your activity and its products from your customers' perspectives, and then plan your strategies.

- **Other Benefits.** Customers often will return not only for direct benefits, but also for such reasons as comradeship or for sharing common career interests. Be alert to the secondary benefits that your activity offers (and can offer), and find ways of highlighting them.

Go to the "Product" worksheet, page D-24, before going on. Record your thoughts on your activity's product(s).

* * *

Write as many Product strategies as you feel necessary. Include your treatment of the product's attributes in the strategy statements. Then use the remaining P's (Price, Place, and Promotion) to develop other marketing strategies.

Now ... to start writing your product strategies. Let's continue with the Youth Services situation as an example.

GOAL:

- Help youth at Fort Imaginary become familiar with computers.

OBJECTIVE:

- Develop and implement an introductory program of computer literacy for children at Fort Imaginary between the ages of 12-15 to be fully implemented by the third quarter of FY 19XX.

STRATEGY DEVELOPMENT:

Choose the product attributes that apply to your product. In the case of our computer training program for youths, all of the attributes would be relevant except "Physical Traits." (For reasons of time, we'll address only one attribute here, "Special Features".)

What special features do we need to develop for our proposed product that would attract customers to our activity and do a good job of meeting their training needs?

Don't forget the competition. Looking back at the major findings of your External Environment Analysis and your Needs Assessment, you would evaluate your competitors (public and private schools, YMCA, day camps, etc.) to see what they offered in introductory computer programs for youths. Then you'd move to make your product more attractive than those that already exist.

One of your activity's strategies might look something like:

STRATEGY:

Youth Services computer classes will better meet the needs of our target market by offering a variety of introductory computer classes, offered on an on-going cyclical basis, with individualized training and a staff to answer questions. Thus, our customers can schedule their training around other activities, unlike the courses offered by our competitors.

**HELPFUL
HINT**

Notice how our strategy above addresses multiple product attributes:

- **Brand name:** "Youth Services Computer Classes";
- **Guarantee:** (implied by customized course structure);
- **Service:** personalized, individual training,
- **Special Features:** on-going schedule, and individualized training, for children on post only;
- **Other Benefits:** convenience to customers' schedules.

STEP 17: DEVELOP PRICING STRATEGIES

Price includes all expenses -- monetary, nonmonetary, direct, and indirect -- that the customer is willing to pay in order to fulfill a want or need. As an activity manager, you need to determine all types of expenses that the consumer is willing to pay for your product in order to develop sound pricing strategies.

For most activities, the customer pays direct monetary costs when purchasing a product. For example, you may decide to charge \$3.00 for each class in computer training. Direct monetary costs are simple. They are the dollar amount of the product --- and nothing more. (For most ACS services, there are no direct monetary costs.)

Record your data on the "Direct Costs" worksheet, pages D-26--27.



HELPFUL HINT

If your marketing plan includes a price change, then discuss both past prices and proposed prices. Include your reason for the change as well.

Be sure to consider the indirect monetary costs for your product. These are expenses that the customer pays money for other than the actual price of the product. In our computer training example, the customer (or customer's parents) may have to pay for a meal or a snack, transportation, plus other incidentals. These are examples of indirect monetary costs. Refer to the "Indirect Costs" worksheet, page D-27.

Consumers may also pay for products in nonmonetary terms. Time and effort are among the most common examples. Customers have to spend their valuable time and effort to get your products. Remember: these two resources are very limited! Most people will think twice before trying to fit something else into their busy schedules. When your customers decide to go to your activity's function, they are agreeing to pay the nonmonetary costs of time and effort.

Some nonmonetary costs are a bit subtler. Each time a customer purchases your product, he/she gives up the opportunity to purchase something else. For example, if your customer decides to come to your computer training classes, he/she cannot go to a baseball game at the same time. Some nonmonetary costs will have a more serious impact, such as those with psychological implications. Be especially aware of the high cost that your customers pay when they participate in programs or activities that may cause embarrassment, stereotyping, or possible impediment to their careers (as with substance abuse programs, preparation for childbirth classes, and other sensitive areas).

How you determine the price for your product will depend mainly on the circumstances within which you operate. You may find that you have complete pricing freedom, limited pricing freedom, or no pricing freedom (mandated prices). In any case, you need to carefully consider all the expenses your customers incur when they purchase your products. This will broaden your understanding of your customers and their wants and needs. Your alertness to the various types of customer costs also might help you reduce your customers' indirect monetary and nonmonetary expenses. (Naturally, you'll also need to continuously monitor the cost of your goods and how much it costs you to provide your products.)

Which expenses -- monetary, nonmonetary, direct, indirect --are the most important? That depends on how much you can control your products' pricing. Using our Youth Services example, assume that your commander has mandated that all computer training will be free. Now your customer's direct monetary costs have been set at zero. You have no pricing freedom. How else can you influence the situation? What about your customers' indirect monetary expenses? Maybe if you find out what those expenses are, you can work on reducing them. How can you make it easier for your customers (who are 12-15 years old) to get the supplies they need for your course? What about their nonmonetary expenses? You might have classes several times a week so your young customers would not have to choose between your program and other things to do. Remember: you'll be serving the Army community better by reducing your customers' costs. You'll also attract more customers to your activity.

You may have limited freedom in pricing. Continuing with our Youth Services example, suppose your commander has enthusiastically endorsed your new computer training program, but he/she has also mandated a maximum price of \$15 for the tuition and supplies. At that price, you couldn't possibly purchase the computers, software, and supplies. So you might decide to solicit commercial sponsorship to supply the computers and software.

You may have complete freedom in determining what prices you will charge. In this case, you may want to use competitive pricing, value-added pricing, or cost-plus pricing. With a competitive pricing approach, Youth Services determines that the average price for computer courses on the economy is \$22.50. We decide to charge \$20.00 to provide an added incentive for our target market to select our product.

Be sure your activity can afford to produce the products that will satisfy the community's needs. Evaluate your activity's budget constraints. If it is not possible for your activity to do all that it would like to, then prioritize the products that are most needed. Refer to the "Activity Costs" worksheet on page D-28.

STEP 18: DEVELOP PLACE STRATEGIES

Place includes all efforts and resources required to facilitate the flow of goods, services, or ideas as they move from the producer to the consumer. Proper place components ensure that your products are where your customers can find them when they want them. Record your thoughts about the following components on the "Place" worksheet (pages D-29 and D-30):

- Location. Hopefully your activity has a great location which helps attract customers. In many cases, however, this is just not true. Is your location readily accessible to consumers? Does your location tend to keep customers away because it conflicts with another activity, office, or function?

Generally there isn't much you can do about your activity's location. But there are indirect ways you can change or reduce the effects. Suppose, for example, your activity was located right near the commander's office. Imagine the potential embarrassment for your clients who are attending your workshop on child abuse -or some other sensitive topic! What to do? You could run your workshop at another facility where there's more privacy. Or perhaps you could schedule the event when the commander's office is closed. The point is to evaluate your location and either exploit it (if the location is agreeable) or take some steps to deal with it.

- Plant. Is the physical plant (i.e., the site, "facility," building, furnishings, etc.) attractive to your customers? Does it reflect the image that your activity wishes to portray? Look at your facility's layout. Is it conducive to the kind of business that you do? What about furnishings? Atmosphere? Cleanliness? Are these items satisfactory? If so, what will you do to keep these going for you? If your plant has a negative impact ... (by now you know what we're going to say!)

- Inventory. Do you maintain a sufficient supply of products, supplies, and materials to satisfy consumers' requirements? Maybe a more appropriate question is: Can you? What are the factors that prevent you from maintaining an adequate supply? Address these factors in your marketing plan whether or not they are controllable.

- Timing. Is your product available when your customers want/need it? Are your activity's hours of operation convenient for your customers? Does your activity's schedule conflict with the schedule of other important or popular events? Sometimes you may want them to conflict, other times you may not. Carefully consider how you time your activity's products.

- Transportation. Transportation refers to the delivery of your products to a location where your customers can obtain them. Is your product available to your customers where they can readily get it? (Transportation does not refer to your customers having to travel to get to your activity.)

STEP 19: DEVELOP A PROMOTIONAL MIX

Promotion is marketing communication. It is the exchange of information between suppliers and consumers. Promotion is designed to inform, remind, and persuade consumers to respond to your product. (Advertising is a form of promotion, that is, persuasion.) There are two major facets of a promotional mix.

Controllable elements are those in which the activity can control the information and its dissemination. Advertising (print, radio, television, and billboards), contests, personal selling, and points-of-purchase displays are examples of controllable elements. Obviously, these elements are the most desirable, but are not always available due to cost, regulation restrictions, or other reasons.

Uncontrollable elements are those which the activity cannot control either the information content or its dissemination. Publicity/public relations, referrals, and word-of-mouth are common types of uncontrollable elements. They're also very effective!

Use the "Promotion" worksheets (pages D-31 -- D-32) that apply to your activity to help you plan your promotion strategies.

DIRECTIONS FOR WRITING YOUR MARKETING PLAN

All of your research, analysis, and planning is finished. You have completed your marketing research and have done an extensive analysis of your activity's position in the market place. You have also developed the goals and objectives for your activity, along with a strategic action plan for attaining the desired ends. Now you're ready to compile your wealth of information into a formal written record.

STEP 20: DEVELOP A WRITTEN PLAN

As we stated in the beginning of this guide, the actual writing of your marketing plan is left to your ability. However, here are some general guidelines for you to follow (see also the "Written Plan" worksheet on page D-33).

Gather all of your completed worksheets (or your notes). Organize them according to the marketing plan outline (Appendix A). Then review all of your data to make sure it is consistent and accurate. If necessary, go back and revise your information.

Be sure that your activity's goals and objectives are clearly derived from your External Analysis,

Needs Assessment, and Organizational Assessment. In turn, be sure that your Strategy Development is clearly based on specific goals and objectives.

Read over all of your material and look for patterns or trends that you may wish to address. You may have to whittle down some of your data. If so, decide on what is most important and delete the remaining material.

Once you feel familiar and comfortable with your data, you're ready to start writing. One of the keys to good writing is getting off to the right start. Sit down in a quiet place and get into a marketing frame of mind. Think about your specific topic (let's say it's External Environment Analysis). Begin jotting down your preliminary thoughts as fast as they come to you -- quickly and briefly. Use "bullets." Keep jotting them down while you have the inspiration. Once you've exhausted your thoughts, go back and read them over. Flesh them out a bit with short phrases so they become more coherent. Then organize your "bullets" into major categories, which will become your paragraphs.

Start writing by addressing each of your "bullets." Write with purpose, that is a sense of direction. Beginning with the External Environment Analysis, take your reader through the stages of research and investigation about your activity and its products. Lead the reader toward your activity's goals, objectives, and strategies.

Follow the format and style of the sample marketing plan (Appendix B). Most marketing specialists recognize and use this form. Refer to the sample plan frequently as you write. Follow its structure and format. Pay close attention to the formal style.

Write concisely. Be direct and get right to the point. Be descriptive and accurate. Say what needs to be said and then get on to the next topic.

Remember to keep the tone of your writing objective and analytical. Avoid using assertions. Support your statements with facts.

HELPFUL HINT

Very few people can sit down and write a paper in one draft. Plan on revising your marketing plan a few times.

Make sure your final copy is accurate in its spelling, grammar, and general format. It's a good idea to have several people review your work before you decide to finalize it. Type or print out your marketing plan. Design your illustrations to have a professional appearance.

Write the entire marketing plan first, and then go back to write the Executive Summary.

STEP 21: *WRITE THE EYECUTIVE SUMMARY*

The Executive Summary is a condensation of the entire marketing plan. It is intended for your superiors to quickly review the highlights of your marketing plan, hence the term "Executive Summary."

Your Executive Summary also serves to entice the reader to read further into the main text of the marketing plan. Writing this section takes special care to be brief and interesting.

Keep the length of this section to one page. Stress the Four P's (product, price, place, and promotion) and target markets supported by your research. Underpin the Four P's with your goals and objectives. Sell your reviewer on your marketing plan, especially on the Four P's and the expected results of your plan (in terms of improved or continued service and meeting the community's needs and wants).

DIRECTIONS FOR IMPLEMENTING YOUR MARKETING PLAN

According to marketing experts, formal marketing plans end with the writing of the Executive Summary. Implementation and Evaluation are not part of the marketing plan. Instead, they are tools for you and your staff members to use in running your activity's programs and checking their progress.

In other words, Implementation is the marketing plan put into action--the actual doing. Evaluation is the process of checking your activity's progress in accomplishing what it has set out to do. Actually, marketing plans are shortened forms of a larger system called the "Strategic Planning Process." In developing your marketing plan, you've already completed most of the Strategic Planning Process.



Figure 6

People who are skillful in business operate by using some form of the "Strategic Planning Process" (see Figure 6). Even if you're not familiar with this method, you're probably using it intuitively to plan the operations of your activity. Our objective is to get you familiar with the Strategic Planning Process and to apply its principles systematically.

STEP 22: IMPLEMENT THE MARKETING PLAN

Your written plan serves no practical purpose unless you put it into action. However, before you can implement your plan, two things must happen: (1) You must get your supervisor's approval and (2) You must get your employees' support.

Part of getting your supervisor's approval will involve briefing him/her on your marketing plan. Be especially prepared to discuss how your plan meets your community's needs (as discussed in your Needs Assessment section). Also be ready to show that your activity has the resources to meet these needs (as discussed in the Resources section of your Organizational Assessment).

As we mentioned earlier in this booklet, your staff should have been actively involved in the planning process. Now you need to get their cooperation in putting the show on the road. Be sure everyone knows what role they will be playing in making the plan work.

Also, for the plan to work, you'll need to determine when everything should be done. For example, if you are planning to distribute flyers 30 days before the event, you'll have to coordinate with the Graphics Department in order to have the flyers produced and delivered to you on time. Coordinate with the appropriate agencies (e.g., purchasing, finance, marketing) about what they will need and when. Once you have approval for your plan, set a timetable for the required actions.

Use the Implementation worksheet on page D-34.

DIRECTIONS FOR EVALUATING YOUR MARKETING PLAN

The Strategic Planning Process is a cycle rather than a single, one-time event. We suggest you review your activity's progress toward attaining its goals and objectives regularly. If you find that you need to make changes in your activity's course of action, go back to your marketing plan and re-enter the process at whichever section is necessary. That's why you'll notice in Figure 6 that from the Evaluation section you can re-enter into any other previous section of the process and make the necessary changes that will keep your activity on track.

STEP 23: EVALUATE THE MARKETING PLAN

Use your marketing plan as a yardstick to determine whether your activity is on course. Pay particular attention to:

1. **Your marketing plan's goals, objectives, and strategies.** Keep in mind the criteria that you developed for your objectives and strategies as you evaluate your activity's progress. Pay close attention to the time periods that you set and to the amount of change that you projected.
2. **The details of your Implementation plans.** Keep track of who should be doing what by what point in time.

If your activity is not meeting its objectives, maybe you need to revise your marketing plan. This is perfectly legitimate. Marketing plans should not restrict your activity to a given course of action. Use the Evaluation worksheet (page D-35).

In keeping with the comparison we made at the beginning of this booklet, a marketing plan is like a map. Maps don't restrict us to a given route; they show us our options. As conditions change, both maps and marketing plans show us alternative ways of meeting our objectives.

**Best of Luck
with your
Marketing Plan Efforts!**